

## Justified Excess Vacation (JEV)

**PA30**

### Change History

Update the following table as necessary when this document is changed:

| Date     | Name       | Change Description                      |
|----------|------------|---|
| 8/9/06   | Lesa Terry | Initial Draft                           |
| 10/26/06 | Lesa Terry | SME approved edits from Cathy Tarricone |

### Purpose

Use this procedure to establish Justified Excess Vacation (JEV) periods using the *Date Specifications* (0041) infotype. This procedure also identifies how to do move quota from the employee's Excess Vacation Accrual (EVA) quota balance to a JEV quota balance.

### Trigger

Perform this procedure when you have received notification that an employee has been approved for a JEV period.

### Prerequisites

- Employee is over the annual leave maximum of 240 hours and is nearing their anniversary date in which they will lose any Excess Vacation Accrual (EVA) quota.

### Menu Path

Human Resources → Personnel Management → Administration → HR Master Data → Maintain










### Transaction Code

**PA30**

### Helpful Hints

HRMS currently has a process to transfer annual leave hours in excess of 240 hours from Quota 31 (Annual leave/vacation) to the Quota 40 (EVA) and is run after the final payroll for each pay period. Expired EVA hours are not deleted but are end dated with the "deduction to" date. They are no longer available to the employee to use after this date. Only quotas that are available for the employee's to use will be displayed on their earnings statements. At this time, Annual Leave/Vacation, EVA and JEV are displayed as one balance. The employee's vacation balance display will be reduced by the number of EVA hours that have expired. This reduction will not be displayed as a negative "adjustment" as it was in Pay1.

The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

| Message Type  | Description   |
|---|---|
| <b>Error</b><br>   | <b>Example:</b>  Make an entry in all required fields.<br><b>Action:</b> Fix the problem(s) and then click  (Enter) to proceed.  |
| <b>Warning</b><br>   | <b>Example:</b>  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end.<br><b>Action:</b> If an action is required, perform the action. Otherwise, click  (Enter) to proceed. |
| <b>Confirmation</b><br> or  | <b>Example:</b>  Save your entries.<br><b>Action:</b> Perform the required action to proceed.  |

## Procedure



If an agency creates the employee's JEV period proactively, any Excess Annual Leave (EVA) will automatically be placed in the JEV quota balance for the designated timeframe.


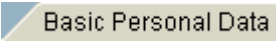
**Example:** John Smith has 240 hours of annual leave as of January 15, 2006. His anniversary date is February 1, 2006. John has been approved for JEV effective January 16, 2006 to October 31, 2006. By using the Date Specifications (0041) infotype and establishing the JEV period, when John receives his annual leave increment on January 16<sup>th</sup> it will automatically be placed into the JEV quota balance.

1. Start the transaction using the menu path or transaction code **PA30**.

## Maintain HR Master Data




2. As required, complete/review the following fields:

| Field Name    | R/O/C | Description   |
|---------------|-------|---|
| Personnel no. | R     | The employee's unique identifying number.<br><b>Example:</b> 5589 |

3. Click  (Enter) to validate the information.
4. Click the  tab.

## Maintain HR Master Data

The screenshot shows the SAP HR Master Data maintenance interface. The top menu bar includes 'HR master data', 'Edit', 'Goto', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. The title bar reads 'Maintain HR Master Data'. The main area displays data for 'Personnel no. 589' and 'Name Ellen Schafer'. Fields include 'PersArea 4958 Dept of Agriculture', 'EEGroup 0 Permanent', 'PSubarea 0001 Non Represented', 'EESubgroup 01 Monthly(M) OT Exem...', and 'Status Active'. A tabbed interface shows 'Basic Personal Data', 'Payroll', 'Benefits', 'Time Recording', and 'Addtl. Person...'. The 'Date Specifications' tab is active, showing a list of infotypes with checkboxes. 'Date Specifications' is checked. The 'Period' section has radio buttons for 'Today', 'A11', 'From curr. date', 'Up to Today', 'Current Period', 'Curr. week', 'Current month', 'Last week', and 'Current Year'. The 'Direct selection' section shows 'Infotype Date Specifications' and 'STy'.


5. Click the gray box to the left of  to select.
6. Click the  radio button in the Period section.
7. Click the  (Overview) button.

## List Date Specifications (0041)

The screenshot shows the SAP 'List Date Specifications (0041)' interface. The top bar includes the SAP logo and standard menu options (Infotype, Edit, Goto, Extras, System, Help). Below the title bar, there are search and navigation icons. The main data area contains the following fields:

- Personnel No.: 5589
- Name: Ellen Schafer
- PersArea: 4950
- Dept of Agriculture
- EEGroup: 0
- Permanent
- PSubarea: 0001
- Non Represented
- EESubgroup: 01
- Monthly(M) OT Exem...
- Status: Active
- Choose: 01/01/1800 to 12/31/9999

Below these fields is a table with columns: From, To, D..Date, D..Date, D..Date, D..Date, D..Date. The first row contains the dates 01/02/2004, 12/31/9999, 01, 01/02/2004, 02, 01/02/2004. The rest of the table is empty. On the left side, there is a 'Find by' section with options: Person, Collective sea, Search term, and Free search. At the bottom right, it says 'Entry 1 of 1'.

8. Click the gray box to the left of the current record to select.
9. Click  (copy) to continue.

## Copy Date Specifications (0041)

Personnel No. 5589 Name Ellen Schafer

PersArea 4950 Dept of Agriculture EEGroup 0 Permanent


PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active

Start 01/02/2004 to 12/31/9999

| Date type           | Date       | Date type           | Date       |
|---------------------|------------|---------------------|------------|
| 01 Anniversary Date | 01/02/2004 | 02 Appointment Date | 01/02/2004 |
|                     |            |                     |            |
|                     |            |                     |            |
|                     |            |                     |            |
|                     |            |                     |            |
|                     |            |                     |            |

10. As required, complete/review the following fields:

| Field Name | R/O/C | Description   |
|------------|-------|---|
| Start Date | R     | The date the record is valid.<br><b>Example:</b> 08/10/2006 |

11. Click in the first blank field in the *Date type* column. Click the  (Matchcode) to open the selection list.

## Copy Date Specifications (0041)

The screenshot shows the SAP HRMS interface for the 'Copy Date Specifications (0041)' process. The main window displays search criteria for Ellen Schafer (Personnel No. 5589) and a table of date specifications. A pop-up window titled 'Date type (1) 129 Entries Found' is open, showing a list of date types. Item 16, 'JEV Begin Date', is highlighted.

| Date type           | Date       | Date type           |
|---------------------|------------|---------------------|
| 01 Anniversary Date | 01/02/2004 | 02 Appointment Date |
|                     |            |                     |
|                     |            |                     |
|                     |            |                     |
|                     |            |                     |
|                     |            |                     |

DT Date type

- 01 Anniversary Date
- 02 Appointment Date
- 03 Original Hire Date
- 04 Prior PID
- 05 Seniority Date
- 06 Separation Eff. Date
- 07 Unbroken Svc. Date
- 08 WMS Review Date
- 09 Vac Lv Frozen UpTo
- 10 Sick Lv Frozen UpTo
- 11 Person group entry
- 12 Commission Date
- 13 Commission Tenure Dt
- 14 Other Agency Comm Dt
- 15 Length of service
- 16 JEV Begin Date**
- 17 JEV End Date
- 18 Prsnl HolidayElgblty
- 19 OriginalCommissionDt

129 Entries Found

12. Click **16 JEV Begin Date**.

13. Click  (Copy) to continue.



## Copy Date Specifications (0041)

**Copy Date Specifications (0041)**

Personnel No. 5589 Name Ellen Schafer

PersArea 4950 Dept of Agriculture EEGroup 0 Permanent



PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active

Start 08/10/2006 to 12/31/9999

| Date type           | Date       | Date type           | Date       |
|---------------------|------------|---------------------|------------|
| 01 Anniversary Date | 01/02/2004 | 02 Appointment Date | 01/02/2004 |
| 16                  |            |                     |            |
|                     |            |                     |            |
|                     |            |                     |            |
|                     |            |                     |            |
|                     |            |                     |            |

14. As required, complete/review the following fields:

| Field Name | R/O/C | Description   |
|------------|-------|---|
| Date       | R     | The beginning date of the JEV period.<br><b>Example:</b> 08/10/2006 |

15. Click in the next blank field in the *Date type* column. Click the  (Matchcode) to open the selection list.
16. Click **17** JEV End Date .
17. Click  (Copy) to continue.

## Copy Date Specifications (0041)

**Copy Date Specifications (0041)**

Personnel No. 40000445 Name Smith Jerry

PersArea 4900 Dept Natural Resources EGroup 1 Temporary


PSubarea 0001 Non Represented EESubgroup 06 M-OT Elig>40hrs/wk Status Active

Start 07/16/2005 to 07/31/2006

| Date type             | Date       | Date type             | Date       |
|-----------------------|------------|-----------------------|------------|
| 01 Anniversary Date   | 06/01/2005 | 02 Appointment Date   | 07/01/2005 |
| 03 Original Hire Date | 06/01/2005 | 07 Unbroken Svc. Date | 06/01/2005 |
| 16                    | 08/01/2006 | 17                    |            |
|                       |            |                       |            |
|                       |            |                       |            |
|                       |            |                       |            |

18. As required, complete/review the following fields:

| Field Name | R/O/C | Description  |
|------------|-------|--|
| Date       | R     | The ending date of the JEV period.<br><b>Example:</b> 01/31/2007 |

19. Click  (Enter) to validate the entry.

## Copy Date Specifications (0041)

Infotype Edit Goto Extras System Help

**Copy Date Specifications (0041)**

Personnel No. 5589 Name Ellen Schafer

PersArea 4958 Dept of Agriculture EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active

Start 08/10/2006 to 12/31/9999

| Date type           | Date       | Date type           | Date       |
|---------------------|------------|---------------------|------------|
| 01 Anniversary Date | 01/02/2004 | 02 Appointment Date | 01/02/2004 |
| 16 JEV Begin Date   | 08/10/2006 | 17 JEV End Date     | 01/31/2007 |
|                     |            |                     |            |
|                     |            |                     |            |
|                     |            |                     |            |
|                     |            |                     |            |

Record valid from 01/02/2004 to 12/31/9999 delimited at end



A warning message will appear that you are delimiting the previous record.

20. Click  (Enter) to validate.


21. Click  (Save) to save.


## List Date Specifications (0041)

The screenshot shows the SAP 'List Date Specifications (0041)' interface. The top bar includes 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. The title bar reads 'List Date Specifications (0041)'. The main area displays data for Personnel No. 5589, Ellen Schafer. The 'Find by' section on the left includes 'Person', 'Collective sea', 'Search term', and 'Free search'. The main data fields show: PersArea 4950, Dept of Agriculture, EEGroup 0, Permanent, PSubarea 0001, Non Represented, EESubgroup 01, Monthly(M) OT Exem., Status Active. A date range is specified as 'Choose 01/01/1800 to 12/31/9999'. Below this is a table with columns: From, To, D..Date, D..Date, D..Date, D..Date, D..Date. The table contains two rows of data: Row 1: 08/10/2006, 12/31/9999, 01 01/02/2004, 02 01/02/2004, 16 08/10/2006, 17 01/31/2007; Row 2: 01/02/2004, 08/09/2006, 01 01/02/2004, 02 01/02/2004. The bottom status bar shows 'Entry 1 of 2' and a message 'Record created'.

| From       | To         | D..Date       | D..Date       | D..Date       | D..Date       | D..Date |
|------------|------------|---------------|---------------|---------------|---------------|---------|
| 08/10/2006 | 12/31/9999 | 01 01/02/2004 | 02 01/02/2004 | 16 08/10/2006 | 17 01/31/2007 |         |
| 01/02/2004 | 08/09/2006 | 01 01/02/2004 | 02 01/02/2004 |               |               |         |



A message will appear  **Record created**

22. Click the  (Back) button to return to the **Maintain HR Master Data** menu.

## Maintain HR Master Data

Personnel no. 5589

Name Ellen Schafer

PersArea 4950 Dept of Agriculture EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exem... Status Active

Basic Personal Data Payroll Benefits Time Recording Addtl. Person...

Infotype text E...

Actions ☒

Organizational Assignment ☒

Personal Data ☒

Addresses ☒

Planned Working Time ☒

Basic Pay ☒

Contract Elements ☒

Date Specifications ☒

Family/Related Person ☐

Period

☐ Period

Fr. 01/01/1800 To 12/31/9999

☐ Today ☐ Curr.week

☒ A11 ☐ Current month

☐ From curr.date ☐ Last week

☐ Up to Today ☐ Last month

☐ Current Period ☐ Current Year

Choose

Direct selection

Infotype Date Specifications STy

23. You have completed this transaction.



HRMS runs a Time Evaluation on each of the payroll processing days (Days 1, 2, and 3) that will update the quota balances according to the correction you just completed.



There is no need to create a quota correction to adjust the quota balances. HRMS will retroactively calculate the quota balances and adjust them accordingly.

**Example:** An employee has earned 33 hours of EVA since July. Your agency enters a begin date of 7/1/2XXX and an end date of 12/31/2XXX for JEV dates. When Time Evaluation runs during the payroll processing days, HRMS will recalculate back to July and the EVA earned from July 1 will be changed to JEV.

### Result

You have created the JEV period for the employee.

**Title:** *Justified Excess Vacation (JEV)*

**Processes :**

**Sub-Processes :**

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HRMS Training Documents

### Comments

Use the Attendance System Change Report (ZHR\_RPTTM084) after the first payroll processing day to verify quota balances. You may also use the *Absence Quotas* (2006) infotype to view the adjustments.